



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Electronic Business Analyst I

Job Code Title

Management Analyst

Pay Band

05

Job Code Number

131815

Information Technology and Processing Division

Processing and Retention Operations Bureau

E-Services Unit

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Information Technology and Processing Division serves as the operational foundation for the department's business units. Through secure, up-to-date computing and processing environments the division's Information and Technology Services Bureau (IT) and Processing and Retention Operations Bureau (PRO) contribute to the department's overall efficiency in document and payment processing while ensuring confidentiality, integrity, and availability of taxpayer data, whether in paper or electronic form. In providing these services, the division enables the department to meet its business objectives and facilitates its mission to serve the citizens of Montana. The division also includes the Administrative Team. The Processing and Retention Operations Bureau ensures secure handling and delivery of taxpayer information, payments, and data to the appropriate systems and staff. The bureau is organized into four units providing tax return and payment processing including Account Maintenance and Cashiering, Data Capture, Electronic Services (E-Services), and Mailroom and Records Management. The E-Services Unit is responsible for ensuring accurate and secure processing of electronic records and payments.

Job Responsibilities

The Electronic Business Analyst researches and processes electronic data and remittance files; resolves customer problems with e-filing and e-payment systems; and provides consultation, training, and outreach to internal and external users based on tax requirements and e-filing processes. The incumbent coordinates the development, implementation, and monitoring of electronic data capture and remittance systems or applications to ensure efficient and cost-effective electronic processing based on department business processes, tax filing requirements, and information system capabilities. The position reports to the E-Services Unit Manager and does not directly supervise other staff.

• Consultation, Training, and Outreach 50%

1. Resolves payment errors such as suspended payments and provides end-user assistance by researching system functions and making corrections. This may involve contacting the taxpayer to determine the details of the payment and the cause of the problem.
2. Researches payment problems in separate systems. Reconciles payments that do not clear by locating the information in the systems, locating the cause of the error, and correcting it. This might involve calling the customer to track down the cause of the problem.

3. Provides training to staff on electronic data capture and remittance processes, rules, policies, procedures, and techniques by documenting system problems and solutions and communicating through verbal and written instructions.
 4. Provides training and assistance to external users, such as taxpayers or their representatives, to explain system functions, identify and resolve problems, and assist them with filing.
 5. Coordinates outreach efforts such as presentations, informational materials, and customer services to explain technical and administrative procedures and respond to taxpayer concerns.
 6. Provides informational updates for division program specifications for placement on the department's Internet site.
 7. Ensures secure handling and delivery of electronic information and reports to appropriate staff.
- **Business System Analysis 45%**
 1. Assesses user needs, system requirements, and performance standards to identify deficiencies and recommends system and process changes. Researches and evaluates new policies; technology; procedures; electronic filing or payment expansion options including additional account types, credit card or electronic check usage; web portal statistics; ACH payment frequencies and volumes; and related electronic filing and payment information.
 2. Assists with software specifications, data element spreadsheets, and data file transfer software applications. Sets vendor specifications for individual and corporate income tax. Directs vendors on software requirements necessary for Montana's electronic tax filing requirements.
 3. Tests vendor software to ensure it meets specifications. Works with vendors to assess capabilities, limitations, costs, and other issues with software to capture tax data along with remittance system functions.
 4. Designs testing procedures. Works with users to implement testing by creating packets consisting of scenarios related to system changes. Communicates testing procedures and changes to staff.
 5. Writes procedures to ensure consistent application of electronic data capture and remittance activities by researching user needs, department requirements, system capabilities, and limitations.
 - **Other Duties 5%**
 1. Performs a variety of other duties as assigned by the supervisor.

Job Requirements

To perform successfully an e-business analyst the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in multi-tasking; paying attention to details and accuracy; organizing multiple tasks within short and inflexible timelines; identifying system problems and resolving them; developing and delivering training; translating technical information to varied audiences; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; conflict resolution; compiling and analyzing data from multiple sources; following written and oral directions and instructions; identifying and correcting data errors; resolving a wide variety of problems and issues; word processing, spreadsheet, database applications; and in using the full range of computer software functions are required. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of business administration, information systems analysis and testing, data file requirement structures and interrelationships, and tax filing requirements and procedures. The position also requires knowledge of computer operating systems and software, databases, and project planning and management.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is two years of college or vocational training in business administration, computer science, or closely related field and three years of job related work experience.
 - Work experience should be made up of electronic tax administration and/or data file transfer methods.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with angry and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use. Due to peak processing seasons, incumbent may work in excess of 40 hours per week which may include evenings and weekends. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Margaret Kauska, Division Administrator Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____

Date: _____

Name (print): _____